## REFERENCE GUIDE FOR DEVELOPMENT OF THE 2005-2009 AREA PLAN

2005-2006 Revision

## **ABRIDGED TABLE OF CONTENTS**

Introduction	i
Part One: Area Plan Background	1
Part Two: Area Plan Goals and Objectives	19
Part Three: Area Plan Maintenance	67
Part Four: Appendices	82
Part Five: Assurances	<b>A-1</b>
Part Six: Definitions	B-1

## **TABLE OF CONTENTS**

<u>introduction</u>	
<ul><li>Foreword</li></ul>	i
<ul> <li>The Role of Area Agencies on Aging</li> </ul>	i
<ul><li>The 2005-2009 Area Plan and Annual Updates</li></ul>	ii
<ul> <li>Instructions for Completion of the Area Plan</li> </ul>	ii
<ul> <li>Applicable Laws and Regulations</li> </ul>	ii
<ul> <li>Instructions for Electronic Entry and Submission of the Area Plan and Updates</li> </ul>	ii
<ul> <li>Transmittal Letter</li></ul>	V
■ Area Plan Checklist 🖧	Vi
Part One: Area Plan Background	
Section A: Setting the Stage	
Description of the Planning and Service Area	1
a. Purpose	
b. Required Content 🔗	
c. Questions	
d. Optional Questions Related to the Family Caregiver Support Program	
2. Description of the Area Agency on Aging	3
a. Purpose	
b. Required Content 🔗	
c. Questions	
3. Mission Statement	5
a. Purpose	
b. Required Content 🔗	
4. Organization Charts	6
a. Purpose	
b. Required Content 🔗	
c. Location of Sample Organization Charts	
Section B: Establishing Priorities	
The Planning Process	8
a. Purpose	
b. Required Content 🛩	
c. Questions	
- Indicates electronic completion of document or section is required.	

**G**✓ Indicates a MUST READ section.

2. Needs Assessment	10
a. Purpose	
b. Required Content 🛩	
c. Questions	
3. Targeting	13
a. Purpose	
b. Required Content 🛩	
c. Questions	
d. Optional Questions Related to the Targeting Section	
4. Identification of Priorities	16
a. Purpose	
b. Required Content &	
c. Questions	
Part Two: Area Plan Goals and Objectives	19
Introduction	
Section A: General Instructions	
Goals and Objectives Criteria	20
a. Purpose	
b. Required Content &	
Section B: Goals and Objectives Guidelines	
System-Building and Administrative Goal and Objective Guidelines	22
a. Purpose	
b. Required Content &	
c. Questions	
d. Resource for Development of Goals and Objectives	
2. Title III B Funded Program Development (PD) Objectives Guidelines	29
a. Purpose	
b. Required Content 🔗	
3. Title III B Funded Coordination (C) Objectives Guidelines	31
a. Purpose	
b. Required Content 🛩	
4. Goals and Objectives Format	34
5. Service Unit Plan Objectives Guidelines	36
a. Purpose	
b. Required Content 🛩	
c. Completing Title III/VII and Title III-E Service Unit Plan Objectives	

f. Completing CBSP Service Unit Plan Objectives	
g. Completing HICAP Service Unit Plan Objectives	
Part Three: Area Plan Maintenance	
Introduction	67
Section A: Requirements	
Resource Table for <u>WHEN</u> Area Plan Documents are Due	68
2. Resource Table for WHAT Area Plan Documents are Required	69
Section B: Updates and Amendments	70
1. Annual Area Plan Update Process 日 <sup>1</sup> a. Purpose	70
b. Required Content &	
c. Directions for Submission of Update Documents	
d. Resource: Diagrams of the Update Process	
2. How to Amend the Area Plan	77
a. Purpose	
b. Required Content 🛩	
c. Directions for Submission of Amendments	
3. Year-End Reporting	78
a. Purpose	
b. Required Content &	
<ul><li>c. Directions for Submission of Year-end Reports</li><li>d. Year-End Report Transmittal Letter</li></ul>	81
Part Four: Appendices – 🖫	01
	82
a. Purpose	02
b. Required Content 🚓	
<ul> <li>Appendix IA – Notice of Intent to Provide Direct Services</li> </ul>	83
<ul> <li>Appendix IB – Request for Approval to Provide Direct Services</li> </ul>	84
<ul> <li>Appendix II – Public Hearings</li> </ul>	85
<ul> <li>Appendix III – Governing Board</li> </ul>	86
<ul> <li>Appendix IV – Advisory Council</li> </ul>	87
<ul> <li>Appendix V – Priority Services</li> </ul>	88
<ul> <li>Appendix VI – Community Focal Points List</li> </ul>	89

d. Completing Title III/VII Ombudsman Service Unit Plan Objectives

e. Completing Title V/SCSEP Service Unit Plan Objectives

<sup>&</sup>lt;sup>1</sup> AAAs are required to update the Area Plan on an annual basis. Information related to updating the Area Plan is found in this section

•	Appendix VII – Multipurpose Senior Center Acquisition and Construction Compliance Seriew	90
•		91
•	Appendix IX – Resource Tools	92
	■ Sample Organization Charts-County	93
	<ul> <li>Sample Organization Charts-AAA</li> </ul>	94
	<ul> <li>Planning Process Diagram</li> </ul>	95
	<ul> <li>Program Descriptions and Funding Sources</li> </ul>	96
	Title III D Fact Sheet	97
	<ul> <li>Long-Term Care Ombudsman- Instructions for completion of the Service</li> </ul>	100
	Unit Plan Objectives	
	<ul> <li>Title VII B elder Abuse Prevention Instructions for completion of the</li> </ul>	101
	Service Unit Plan Objectives	
•	Appendix X Legal Services	102
•	Appendix XI Disaster Preparation Planning	103
•	Appendix XII Baby Boomer Information	105
•	Appendix XIII Required Services provided without the use of State and/or Federal	107
•	funds	
Part	Five: Assurances	
Part	Six: Definitions	A-1
	<u> </u>	D 1

B-1